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ABSTRACT

This survey was designed to target approximately 7,000 leaders in business, education, media, environmental advocacy, and government in ten regional areas throughout the United States. The survey was designed to accomplish the following: identify the environmental priorities, determine leaders' perceptions on a range of policy-related issues, and to provide data for environmental policy and planning. The response rate was 31.5%. This report describes: (1) the demographics of the survey sample; (2) priority issues as identified by the respondents; (3) respondent perceptions of the environmental performance of the Ford Motor Company; and (4) respondent perceptions about significant environmental issues. (CW)

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1989 Environmental Issues and Priorities Survey

Executive Summary

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I. Introduction

In the fall of 1989, the Ford Motor Company retained HRN, a national consulting firm specializing in issues research, to conduct a survey of key leaders who are or will be involved in helping to shape public policy on a wide range of environmental issues into the early 1990s.

The 1989 Environmental Issues and Priorities Survey was designed to target approximately 7,000 leaders in Business, Education, Media, Environmental Advocacy, and Government in 10 regional areas throughout the country.

This research is part of Ford's efforts to identify the environmental priorities of leaders at the community, state, regional, and national levels; to determine leader's perceptions on a range of environmental policy-related issues; and to provide the company with extensive data for environmental policy and planning.

The data generated by this survey will help Ford understand the role key leaders expect American industry in general, and Ford in particular, to play in the ongoing debate on complex environmental issues. It also provides quantitative data on complex policy issues, and gives Ford's management extensive information on the directions environmental policy questions are likely to take in the next decade.

Specifically, the 1989 Environmental Issues and Priorities Survey was designed to accomplish the following:

- ☐ Identify the priorities of environmental issues among involved leadership at the community, state, regional, and national levels;
- ☐ Determine leaders' awareness and perceptions of the trade-offs and implications involved in making environmental policy decisions at the state and federal levels;
- ☐ Communicate to those surveyed that Ford is an interested and collaborative participant in the debate on environmental issues;
- ☐ Understand leaders' expectations for industry's role in addressing these issues, both generally and for the automotive industry in particular;
- ☐ Provide quantitative research on environmental issues in the public policy arena, and on the most effective ways to position Ford on complex policy issues;
- ☐ Provide Ford's senior management with intelligence on the directions that the environmental movement is likely to take in the early to mid-1990s.

The content of the survey was developed by HRN in cooperation with the external affairs staff at Ford Motor Company. HRN honored changes requested by Ford with

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regard to phrasing, format, response options, and methodology, as long as those changes did not affect the validity of the statistical results.

- ☐ Survey sample list development targeted individuals who will have an influence on environmental policy in each of 10 regions throughout the country, identified in this research as Atlanta, Boston, Chicago, Cleveland, Dallas, Denver, Louisville, Los Angeles, New York, and San Francisco Regions. Additional list development targeted a limited number of leaders in the Detroit and Washington, D.C. regional areas.

List development led to an initial mailing of 7,581 invitations to participate in the survey. The initial letter of invitation gave recipients the option of returning a card to remove themselves from the list of recipients. Of the total sample, 6.4% — 484 — chose this option, and an additional 226 letters were returned as undeliverable.

In October of 1989 a questionnaire was mailed to a sample of 6,868 individuals.

- ☐ A total of 2,172 survey questionnaires were completed and returned, for a response rate of 31.5%.

Survey respondents were asked to describe their professional/organizational affiliations within 13 categories shown on the right below. These 13 categories were combined to form the 5 constituency groups shown on the left below. These constituency groups made the data easier to understand and work with.

Combined Category	**Original Categories**
Media	Local or Regional Media National Media
Government	Local Elected or Appointed Government Official State Elected or Appointed Government Official Federal Government, Executive Branch Federal Government, Legislative Branch
Environmental Advocacy	Local or Regional Environmental Group Local or Regional Chapter of a National Environmental Group National Office of an Environmental Public Interest Group
Education	Higher Education or "Think Tank" Research
Business/Economic Development	Small Business Large Business Economic Development

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Statistically, the overall results of this survey are accurate to plus or minus 5%, with a confidence interval of 95%. This means that we can be 95% sure that the percentages given for the "all those responding" category are within 5% of the results that would have been achieved with a 100% rate of return of the survey. Categories representing a subset of the sample may have higher potential statistical error, depending upon the response rate for that category.

Other factors influencing research of this type include original sample composition, the composition of the group returning the questionnaires, and the construction of the survey instrument itself. The original sample was designed to represent, as proportionately as possible, the leadership of the community on this issue. The composition of the group returning the questionnaires — as diverse as it is — may differ somewhat from the original target sample, since it is impossible to control who chooses to participate.

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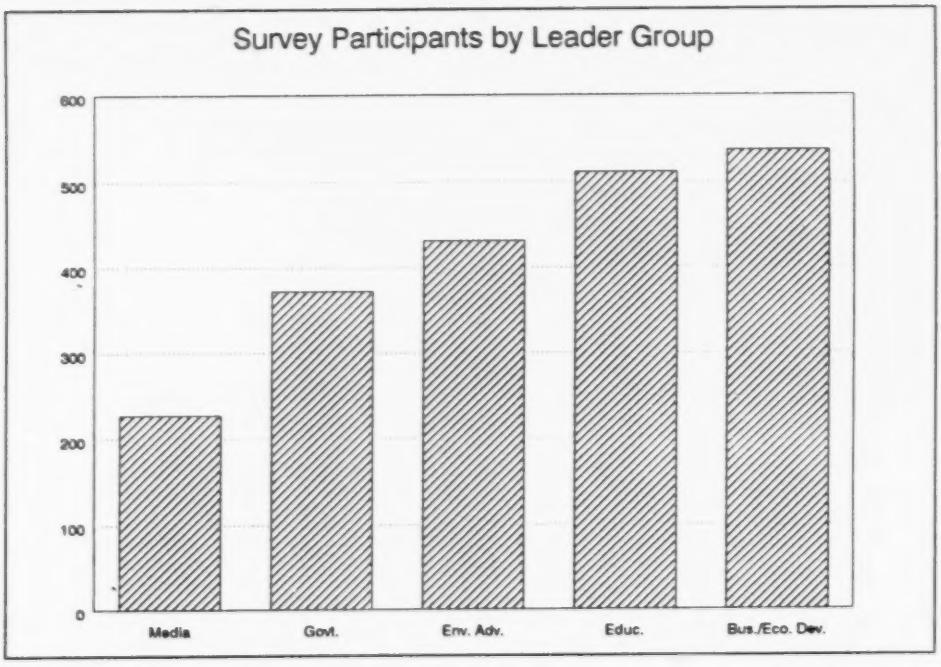
II. Demographics

A. Survey Participants by Primary Leader Group

☐ A total of 2,172 people, from among 6,868 invited to participate, completed and returned a questionnaire. This represents an overall response rate of 31.5%.

	Responses	% of All Responding
Business/Economic Development	536	24.7
Education	511	23.5
Environmental Advocacy	430	19.8
Government	371	17.1
Media	227	10.5



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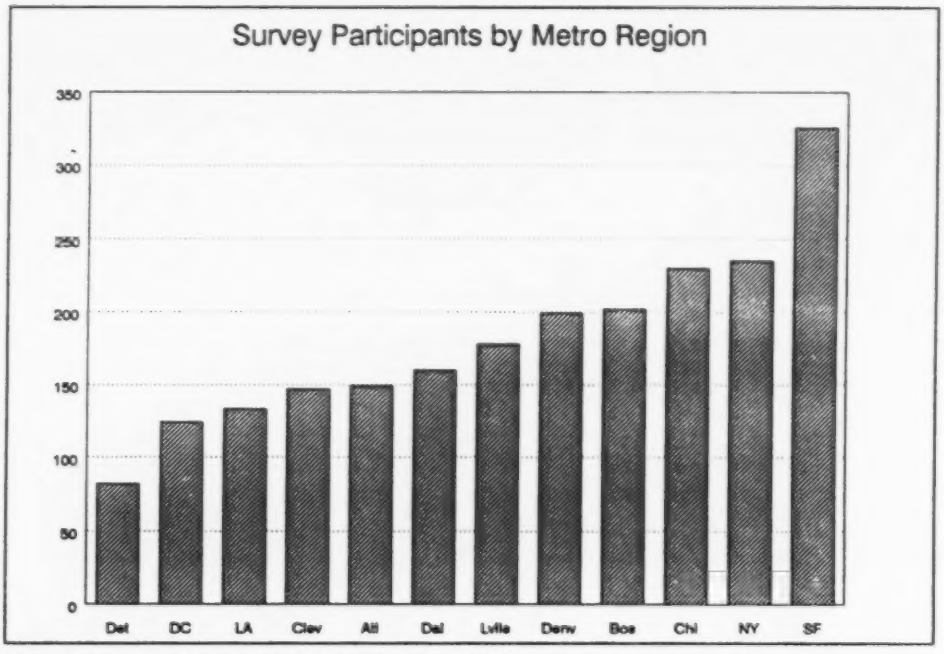
B. Survey Participants by Region

☐ A greater number of returned surveys came from the San Francisco region than from the other regions; the fewest returned surveys came from the Detroit regional area. Original list development activities were not designed to result in a proportionate sample for the Detroit and Washington, D.C. regional areas, but focused on ten primary regional areas of interest.

	Responses	% of All Responding
1. San Francisco	326	15.0
2. New York	235	10.8
3. Chicago	230	10.6
4. Boston	202	9.3
5. Denver	199	9.2
6. Louisville	178	8.2
7. Dallas	160	7.4
8. Atlanta	149	6.9
9. Cleveland	147	6.8
10. Los Angeles	133	6.1
11. Washington, DC *	124	5.7
12. Detroit *	82	3.8



* *NOTE: The Washington, D.C. and Detroit regional areas are included in the sample to gain a better picture of the environmental views of specific groups; the number of surveys distributed in these areas was intentionally smaller than in other regions.*

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C. Survey Participants by Age

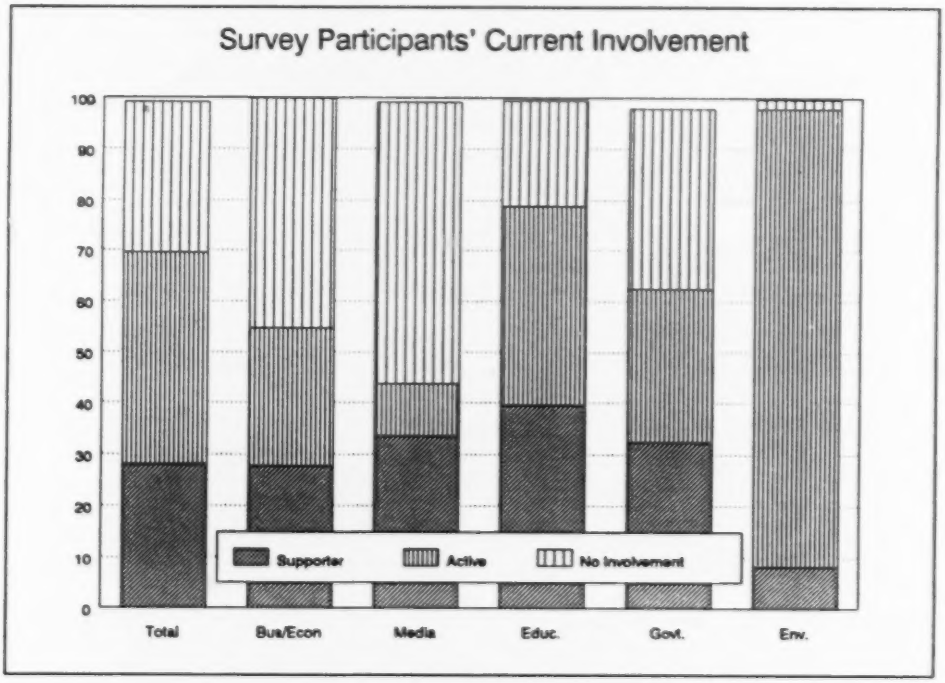
- A majority (63%) of survey participants are 35 to 54 years old; 12% are 21 to 34 years old and 25% are aged 55 or older.

D. Duration of Activity in Issues

- Sixty-five percent of the respondents have been active participants in environmental issues for more than 10 years. About 13% say they have been active for 6 to 10 years; a similar percentage say they have been active for five years or less. More than one-quarter of those representing the media say they are not active.

E. Involvement in Environmental Organizations

- Almost 70% of the respondents say they are members of an environmental group or organization. More than 40% say they participate in group activities or perform key organizational functions, including 90% of those representing Environmental Advocacy and 40% of those representing Education. The Media reported the least active levels of involvement; 55% of these respondents say they are not involved.



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F. Level of Commitment to Environmental Issues

- One-quarter of the respondents say they are committed to making personal sacrifices to protect the environment; 41% of respondents say they participate in environmental activities; and about one-third say they follow the development of these issues.

- Those representing Environmental Advocacy reported the greatest level of commitment to environmental issues; 52% say they have committed to making personal or lifestyle sacrifices to protect the environment. Fewer than 15% of those Media and Business respondents say they have made similar sacrifices, while more than one-half of these groups say they have contributed to the effort in some way.

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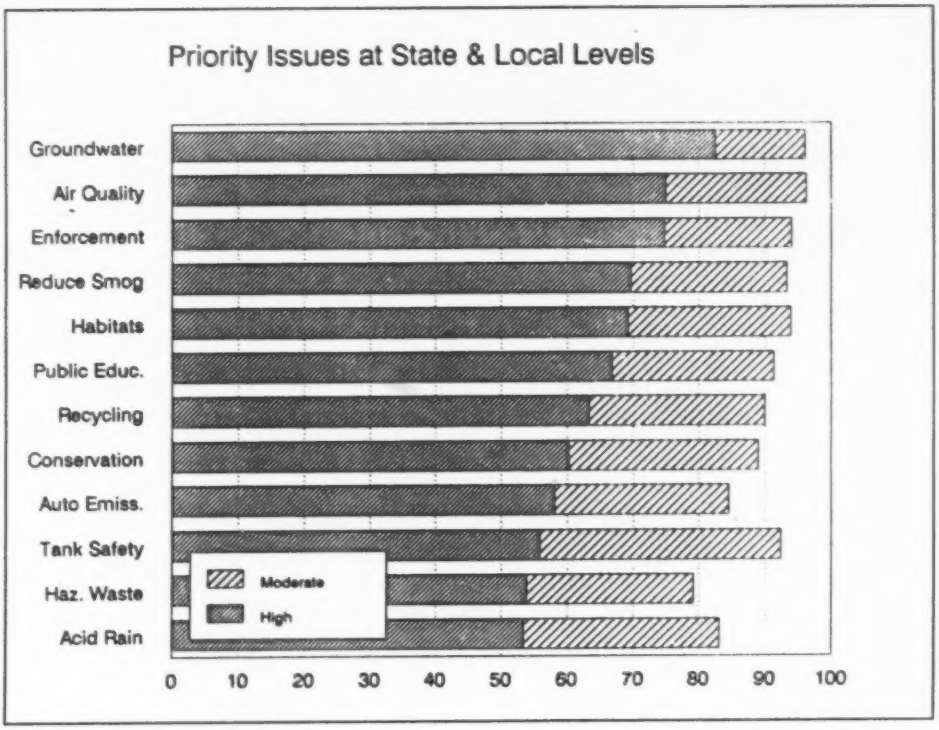
III. Priority Issues

A. Top Priority Issues at the State and Local Levels

☐ The ten highest priority issues at the state and local levels are:

		High Priority	Moderate Priority
1.	Protecting Groundwater	82.5%	13.6%
2.	Improving Air Quality	75.0	21.3
3.	Enforcement Action Against Polluters	74.8	19.2
4.	Reducing Smog	69.7	23.6
5.	Protecting Wildlife Habitats	69.2	24.7
6.	Public Education on Environmental Issues	66.8	24.5
7.	Requiring Mandatory Recycling	63.3	26.7
8.	Creating Incentives for Energy Conservation	60.3	28.7
9.	Reducing Automobile Emissions	58.1	26.4
10.	Underground Storage Tank Safety	55.9	36.5



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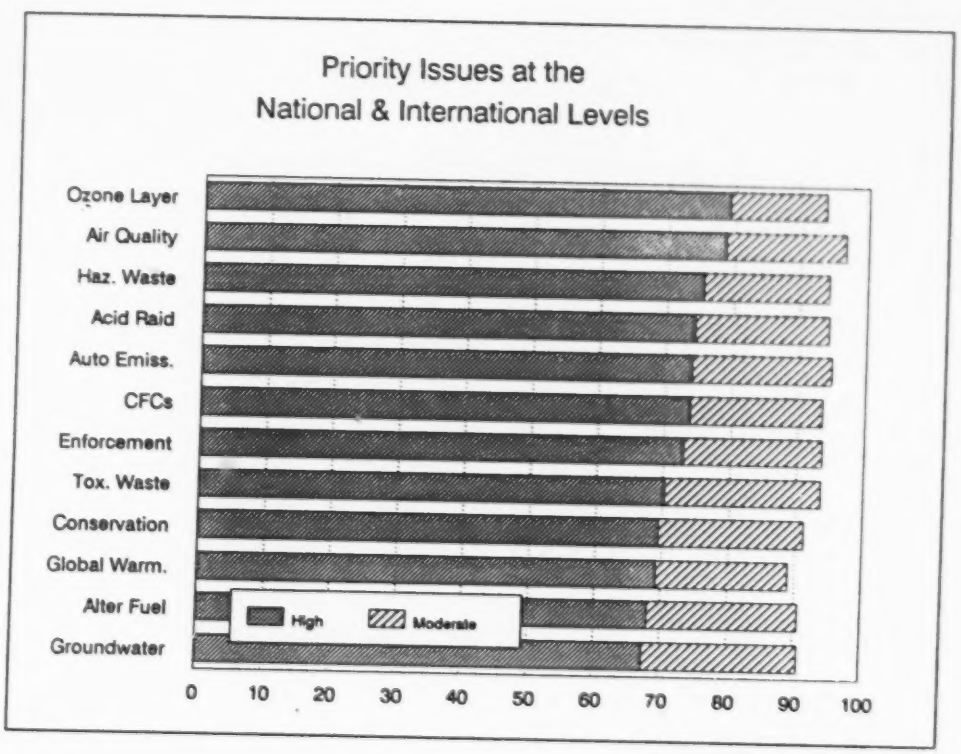
B. Top Priority Issues at the National and International Levels

☐ The ten highest priority issues at the national and international levels are:

	High Priority	Moderate Priority
1. Preserving the Ozone Layer	79.1%	14.5%
2. Improving Air Quality	78.6	18.0
3. Hazardous Waste Disposal	75.4	18.8
4. Reducing Acid Rain	74.2	20.1
5. Reducing Automobile Emissions	73.9	21.0
6. Reducing Use of CFCs	73.8	19.8
7. Enforcement Action Against Polluters	72.9	20.8
8. Implementing Standards for Toxic Emissions	70.2	23.4
9. Creating Incentives for Energy Conservation	69.4	21.8
10. Curtailing Global Warming	69.2	19.8



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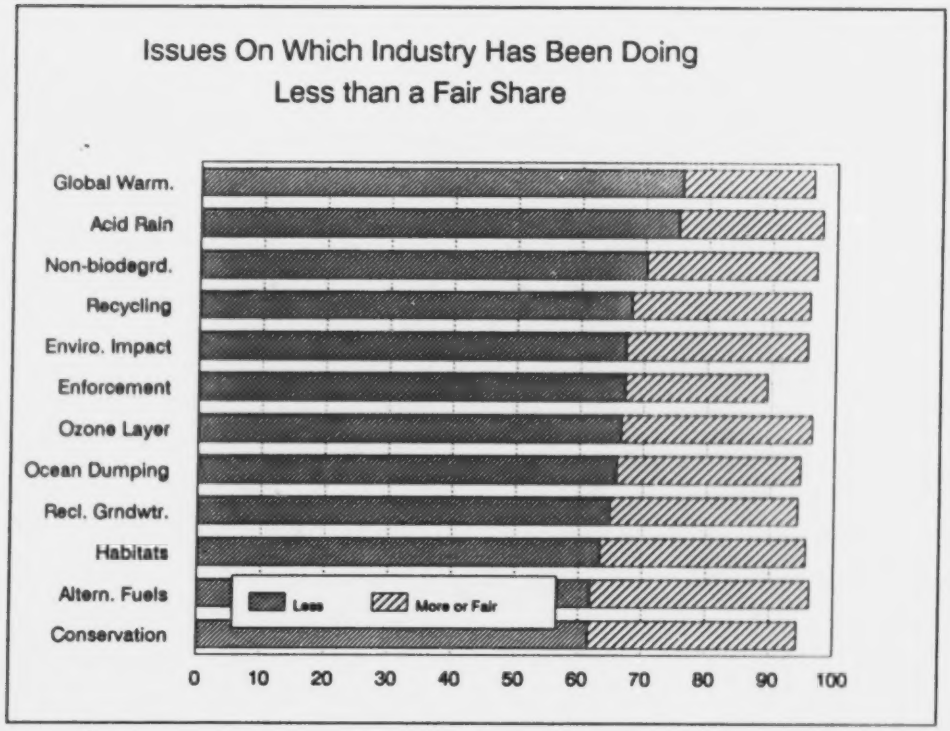
C. Industry's Environmental Performance

☐ Survey respondents believe that Industry has been doing less than its fair share in addressing these issues:

		Doing Less Than Fair Share
1.	Curtailing Global Warming	75.8%
2.	Reducing Acid Rain	75.2
3.	Reducing Use of Non-biodegradable Materials	70.2
4.	Requiring Mandatory Recycling Where Feasible	68.0
5.	Disclosing Operations' Environmental Impact	67.2
6.	Enforcement Action Against Polluters	67.1
7.	Preserving the Ozone Layer	65.9
8.	Eliminating Ocean Dumping	65.9
9.	Reclaiming Contaminated Groundwater	64.9
10.	Protecting Wildlife Habitats	63.4
11.	Developing Alternative Fuels	61.9
12.	Creating Incentives for Energy Conservation	61.6
13.	Reducing Contamination of Groundwater	59.0
14.	Implementing Standards for Hazardous Waste	57.9
15.	Implementing Standards for Toxic Emissions	56.2



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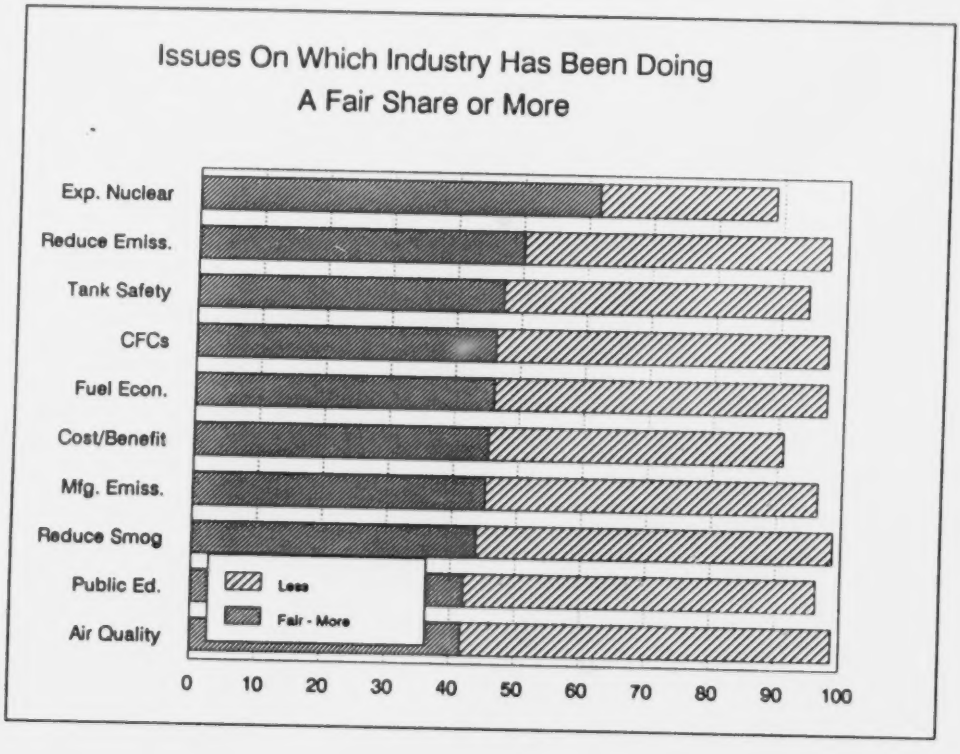
☐ On the other hand, when compared to Industry's performance on other environmental issues, a greater percentage of respondents say Industry has been doing its fair share or more than its fair share in addressing these ten issues:

	Doing Fair Share or More
1. Expanding Use of Nuclear Power	61.6%
2. Reducing Auto Emissions	50.2
3. Underground Storage Tank Safety	47.2
4. Reducing Use of CFCs	46.2
5. Increasing Auto Fuel Economy	46.1
6. Disclosing Cost/Benefit of Gov't Decisions	45.5
7. Reducing Toxic Emissions in Manufacturing	45.1
8. Reducing Smog	43.9
9. Public Education on Environmental Issues	42.1
10. Improving Air Quality	41.7



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D. Government's Environmental Performance

- ☐ Survey respondents believe that Government has been doing less than its fair share in addressing these issues:

	Doing Less Than Fair Share
1. Curtailing Global Warming	74.6 %
2. Reducing Use of Non-biodegradable Materials	74.3
3. Requiring Mandatory Recycling Where Feasible	73.8
4. Reducing Acid Rain	73.5
5. Developing Alternative Fuels	73.3
6. Creating Incentives for Energy Conservation	73.1
7. Disclosing Cost/Benefit of Government Decisions	66.3
8. Preserving the Ozone Layer	65.9
9. Eliminating Ocean Dumping	65.3
10. Reclaiming Contaminated Groundwater	61.8
11. Enforcement Action Against Polluters	59.7
12. Levying Gasoline Taxes to Encourage Conservation	56.9
13. Public Education on Environmental Issues	56.7
14. Improving Air Quality	56.3
15. Reducing Contamination of Groundwater	55.1
16. Reducing Smog	54.3

- ☐ When compared to Government's performance on other environmental issues, a greater percentage of respondents say Government has been doing its fair share or more than its fair share in addressing these ten issues:

	Doing A Fair Or More Than Fair Share
1. Underground Storage Tank Safety	53.4 %
2. Expanding Use of Nuclear Power	50.7
3. Reducing Auto Emissions	49.6
4. Implementing Emissions Standards	45.5
5. Reducing Toxic Emissions in Manufacturing	44.4
6. Protecting Wildlife Habitats	44.1
7. Increasing Fuel Economy	43.9
8. Implementing Hazardous Waste Standards	43.8
9. Reducing Use of CFCs	43.3
10. Disclosing Operations' Environmental Impact	40.4

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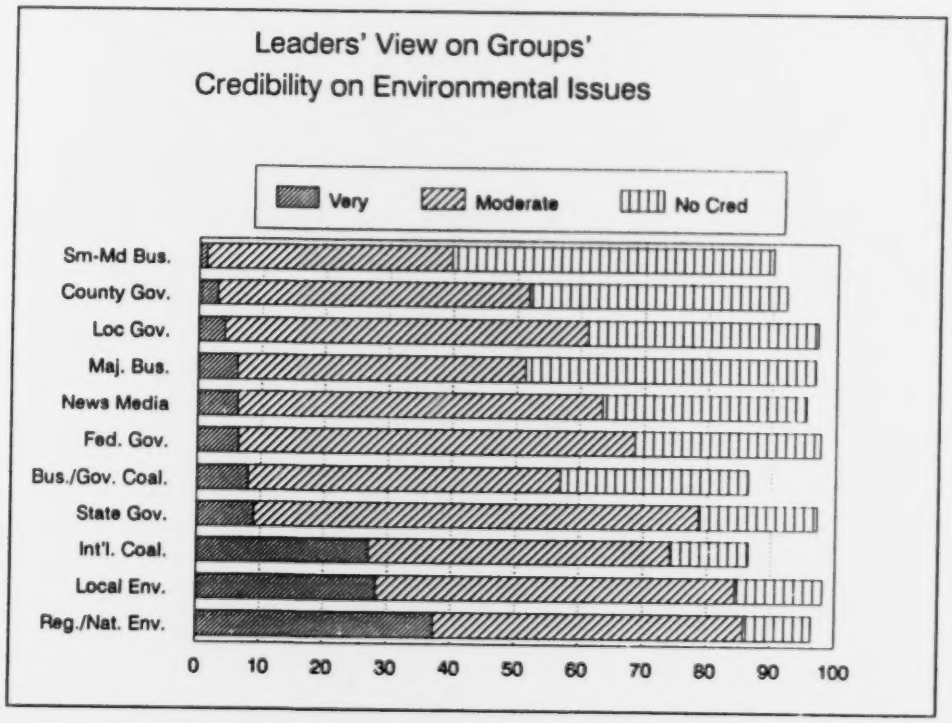
E. Leaders' Views on Groups' Credibility on Environmental Issues

- Some groups have more credibility with respondents on environmental issues than do other groups. The most credible to the total sample are:

	Very Credible
1. Regional and National Environmental/Conservation Groups	37.3%
2. Local Environmental/Conservation Groups	28.8
3. International Environmental Coalitions	27.1

- Credibility among the remaining groups drops at this point — from 27.1% of respondents saying International Environmental Coalitions are very credible, to 9.0% of respondents saying State Government is very credible. Major Business and Industry and other Governmental groups have low credibility with respondents. Small- and Medium-sized Businesses have the lowest credibility of all the groups.



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F. Groups' Future Role in Environmental Protection Efforts

Respondents say they believe each of the groups identified will have an expanded role in addressing environmental concerns during the next few years.

- ☐ Nearly one-half of those responding say International Environmental Coalitions and Regional/National Environmental Groups' roles will expand greatly.
- ☐ About 43% say the roles of State Government and Federal Governments, Local Environmental Groups, and Major Business and Industry will expand greatly as well.
- ☐ Fewer than one-third of all those responding say any group's role will stay the same. When compared to others, a greater percentage of respondents say the role of Medium and Small Business and the Media will remain unchanged.

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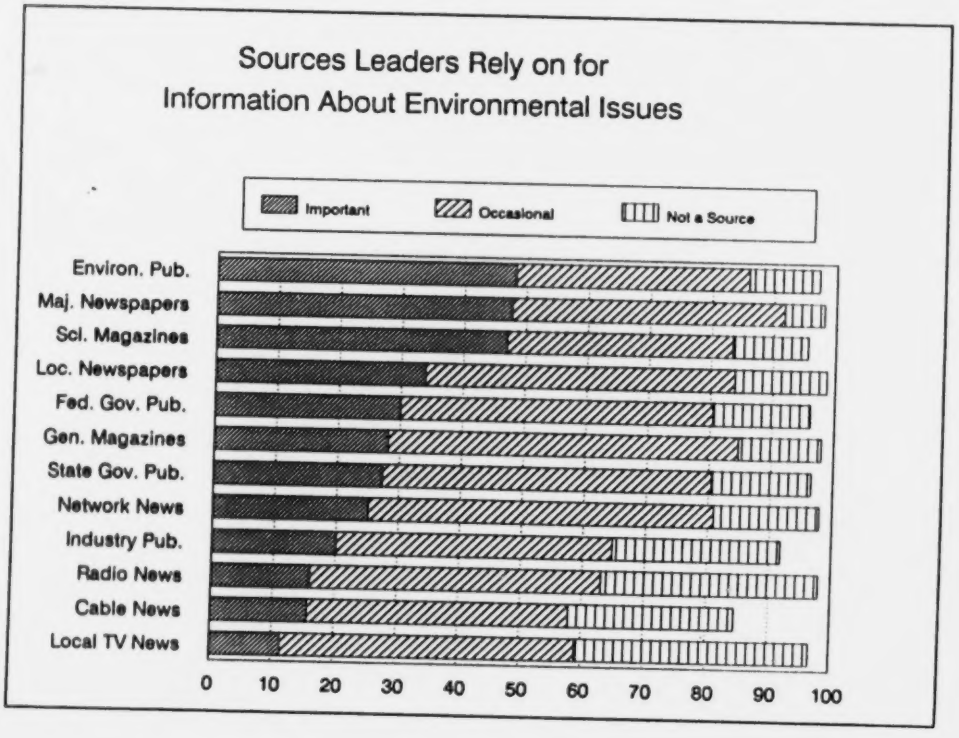
G. Sources Leaders Rely on for Information about Environmental Issues

☐ The sources leaders rely on for information on environmental issues include the following, ranked by those saying each is an "important" source:

	Important Source	Occasional Source
1. Environmental Group Publications	48.3%	37.6%
2. Major National Newspapers	47.7	44.0
3. Science Magazines	47.0	36.5
4. Local Newspapers	33.9	50.0
5. Federal Government Publications	30.0	50.5
6. General Magazines	28.1	56.6
7. State Government Publications	27.4	53.1
8. Network News Broadcasts	25.2	55.8
9. Industry Publications	20.1	44.7
10. Radio News Broadcasts	16.0	47.1
11. Cable News Broadcasts and Programs	15.7	42.2
12. Local Television News Broadcasts	11.5	47.6



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IV. Ford's Performance

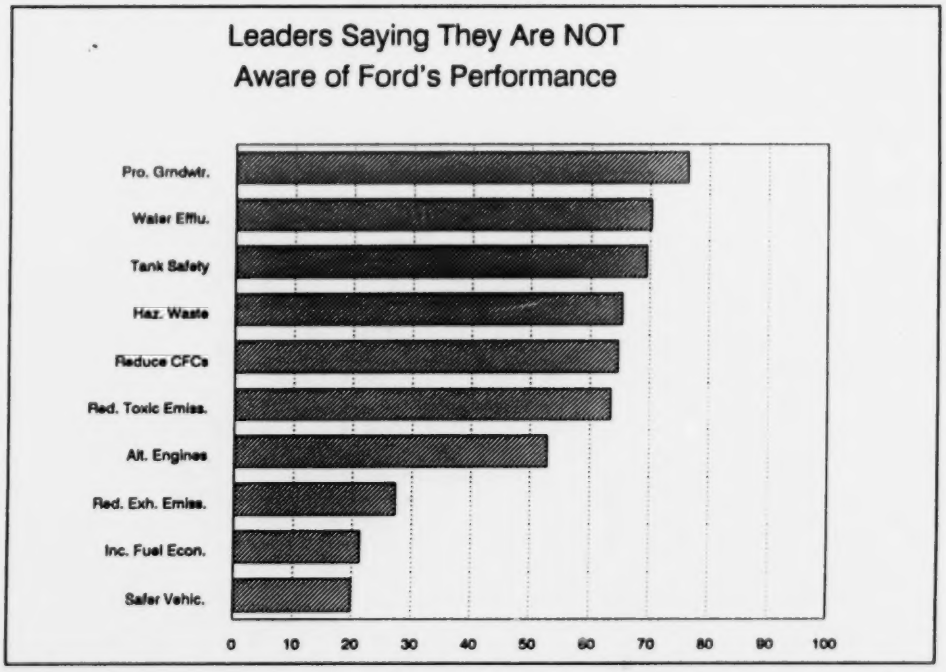
A. Leaders' Awareness of Ford's Environmental Performance

☐ Survey respondents say that they are Very Aware or Moderately Aware of Ford's performance on three issues:

	Very Aware or Moderately Aware
1. Developing Safer Vehicles	47.5%
2. Increasing Fuel Economy	41.8%
3. Reducing Exhaust Emissions	32.1%

☐ Most respondents say that they are not aware of Ford's performance on a number of issues:

	Not Aware of Ford's Performance
1. Protecting Groundwater	76.4%
2. Eliminating Pollutants from Water Effluent	70.2
3. Maintaining Underground Tanks Safely	69.5
4. Disposing of Hazardous Wastes	65.4
5. Reducing Use of CFCs	64.7
6. Reducing Toxic Emissions in Manufacturing	64.7
7. Developing Alternative Fuel Engines	52.9



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- ☐ Respondents representing Business and Economic Development are consistently more aware of Ford's performance on issues than are any other groups represented.

- ☐ Respondents representing the Media are more aware than other groups of Ford's performance on these issues:

  1. Developing Safer Vehicles
  2. Increasing Fuel Economy
  3. Reducing Exhaust Emissions
  4. Developing Alternative Fuel Engines
  5. Reducing Toxic Manufacturing Emissions
  6. Reducing Use of CFCs

- ☐ Respondents representing Government are more aware than other groups of Ford's performance on these issues:

  1. Maintaining Underground Tanks Safely
  2. Disposing of Wastes Properly
  3. Eliminating Pollutants in Water Effluent

- ☐ Respondents representing Environmental Advocacy are more aware than other groups of Ford's performance in protecting groundwater.

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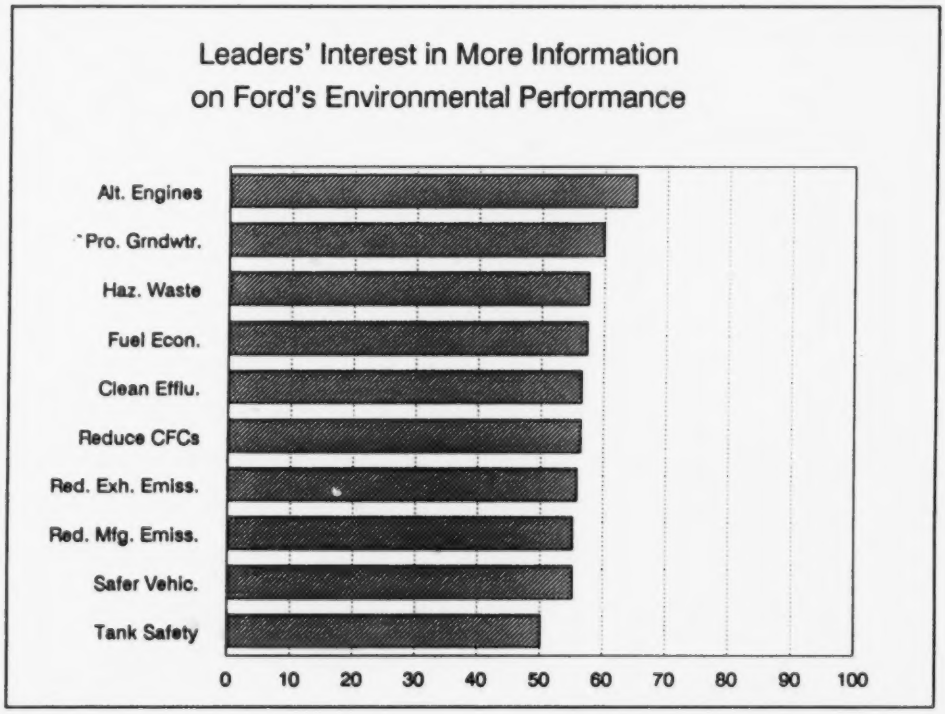
B. Leaders' Interest in More Information on Ford's Environmental Performance

☐ Most survey respondents say that they want more information on Ford's performance on a number of issues:

	Want More Information On Ford's Performance
1. Developing Engines that Use Alternative Fuels	65.8%
2. Protecting Groundwater	59.9
3. Disposing of Hazardous Wastes	57.6
4. Increasing Fuel Economy	57.4
5. Eliminating Pollutants from Water Effluent	56.5
6. Reducing Use of CFCs	56.4
7. Reducing Exhaust Emissions	55.9
8. Reducing Toxic Emissions in Manufacturing	55.2
9. Developing Safer Vehicles	55.2
10. Maintaining Underground Tanks Safely	50.1



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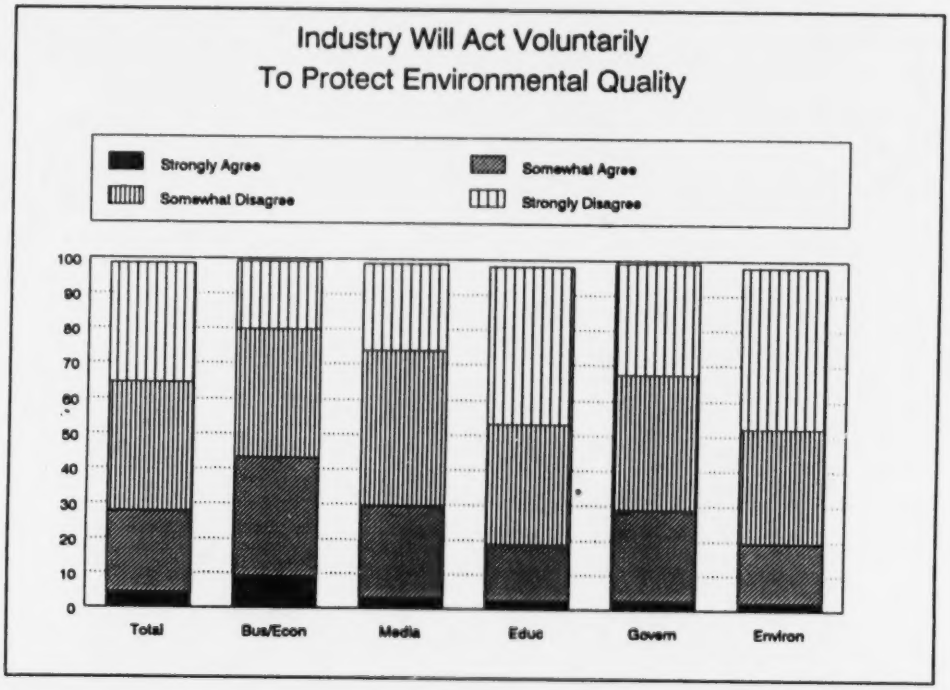
V. Leaders' Perceptions About Significant Environmental Issues

A. Industry and the Environment

- ☐ More than 60% of all those responding agree that Industry will have an accurate perception of the public's concern about environmental issues. About 35% disagree, including more than 40% of Environmental leaders, and nearly 40% of those representing Education.

- ☐ Fully 70% of respondents say industry will not voluntarily take steps to protect the environment.



- ☐ Respondents are split over whether industry's capacity to pay costs associated with environmental cleanup should be a guiding factor in new legislation or regulation. Nearly two-thirds of Business/Economic Development respondents say industry's capacity to pay should influence such legislation; conversely, almost 60% of Environmental Advocacy leaders disagree, and 40% disagree strongly.

- ☐ An overwhelming percentage of respondents say industry should be held liable for environmental damage and cleanup caused by their actions, including 80%

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who strongly agree and 15% who agree somewhat.

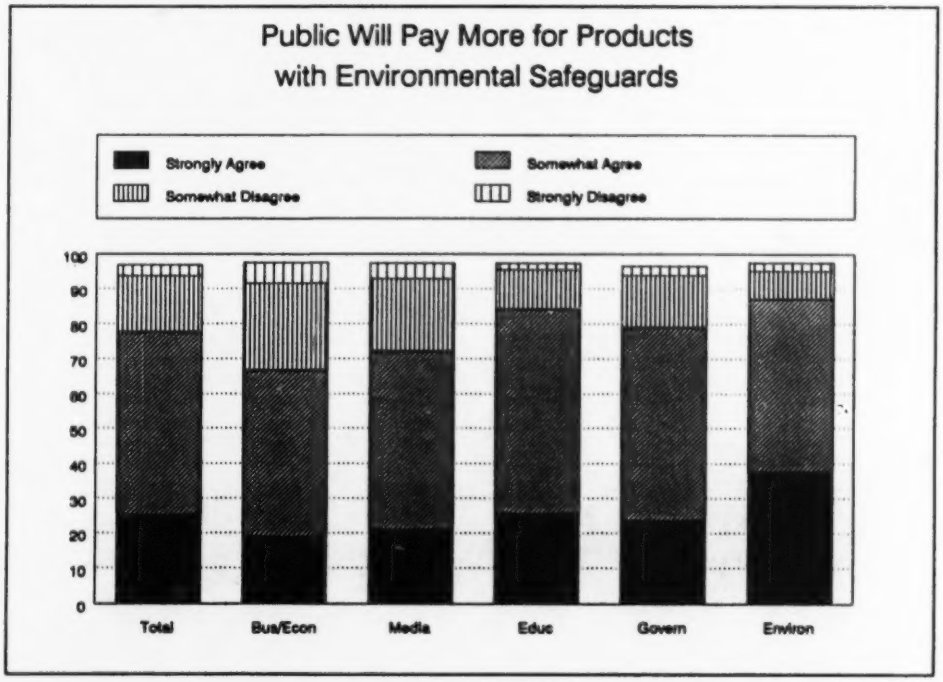
- ☐ Nearly 90% of all those responding say industry and environmentalists should work closely to devise practical standards that balance job preservation and environmental quality. More than 90% of Business respondents and 82% of Environmental respondents concur.

B. The Public and the Environment

- ☐ About 90% of respondents agree that the public's awareness of environmental issues will grow very rapidly in the next few years. More than 90% say the public's concern will make it a top priority into the 1990s.

- ☐ More than 75% of those responding say they believe the public will understand very little about the technical aspects of environmental protection.

- ☐ Most respondents (77.7%) agree that the public will be willing to pay more for



products with greater environmental safeguards; fewer than 20% disagree overall, including about 30% of Business and Economic Development respondents.

- ☐ About 70% of respondents agree that the public will accept a moderate reduction

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in the standard of living in order to protect the environment; 25% disagree, including about 35% of Business respondents.

- ☐ Less than 8% say the public will be confident that industry will take the right steps to protect the environment without government regulations requiring it to do so; more than 90% disagree. About 9% say Ford Motor Company will take such steps without government intervention; 80% disagree; and about 10% are not sure.

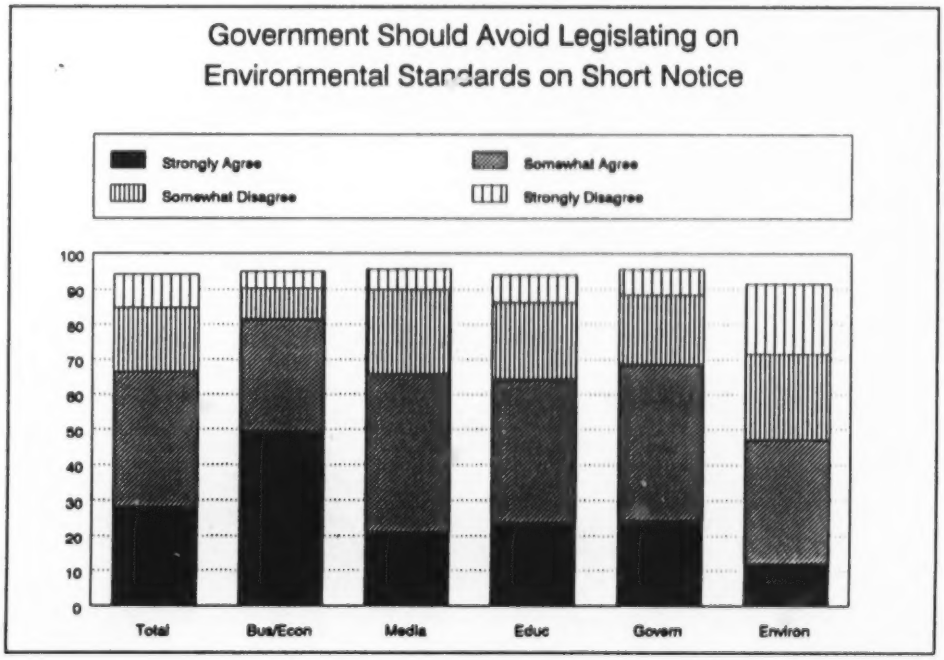
C. The Role of Government in Environmental Quality

- ☐ Nearly 90% of all those responding say the Environmental Protection Agency should accelerate efforts to research and identify more accurate standards for safe environmental practices.

- ☐ About 93% say the EPA should accelerate efforts to use Superfund monies that have already been allocated to clean up Superfund hazardous waste sites.

- ☐ The federal government should take the lead in setting environmental standards, rather than having various standards set by the states, according to 85% of all those responding; nearly 80% of those representing Government concur.

- ☐ More than 90% of respondents agree that the U.S. government should create a



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long-term plan that protects the environment and creates a predictable regulatory framework allowing industry to invest in long-term economic and environmental programs; fewer than 5% disagree.

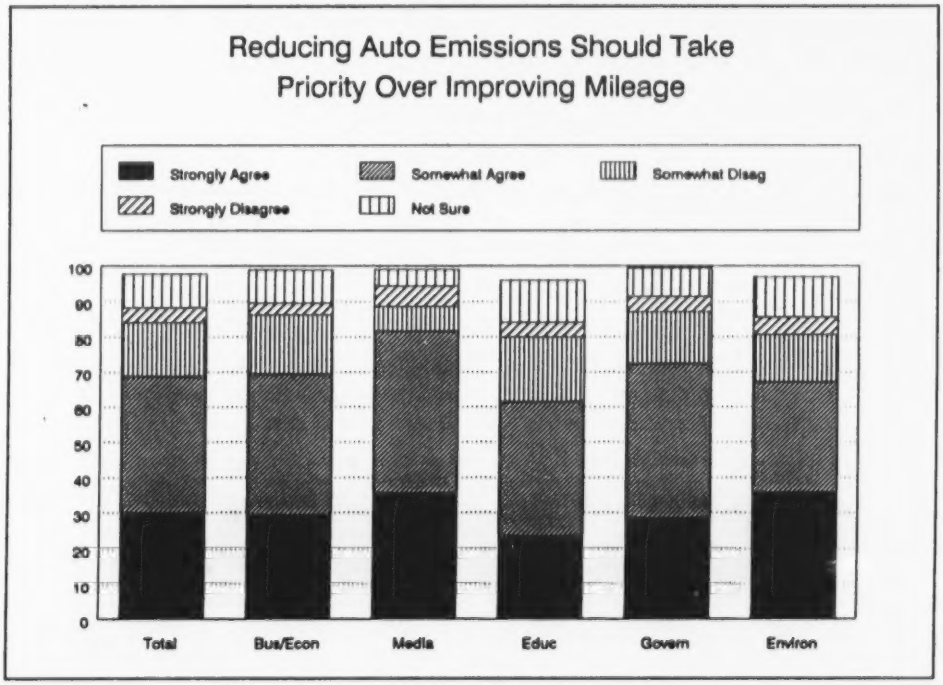
- ☐ State governments will continue to enact more stringent environmental legislation than that of the federal government, according to about 70% of all those responding; about 23% disagree.

- ☐ More than 65% of respondents say state and local governments should avoid legislating major changes in the management of environmental standards on short notice; about 30% disagree, including 45% of Environmental Advocacy respondents.

D. Energy Conservation and Alternative Fuels

- ☐ Ninety percent of all those responding say the federal government should create economic incentives to encourage conservation by both industry and consumers; fewer than 10% of respondents disagree.

- ☐ Nearly 75% say the public will be willing to pay more for fuels that are less damaging to the environment than fossil fuels; about 21% disagree, including more than 30% of Business/Economic Development respondents.



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- ☐ Almost 70% of all those responding say that reducing automobile emissions should be of a higher priority than getting better mileage; about 20% disagree, and 10% are not sure.

- ☐ More than 90% say the federal government should create economic incentives that encourage industry to develop new or alternative energy sources within U.S. borders; less than 10% disagree.

- ☐ Although 35% say making cars safer to operate should be a higher priority than increasing gas mileage or reducing auto emissions, including about 45% of those representing Business and the Media, about 50% of all those responding disagree.

- ☐ Almost 85% of respondents say automobile companies should bring cars that use clean-burning fuels to market sooner, even though such cars could cost more to buy and operate than current models. Compared to the average, a slightly higher percentage of those representing Business and Economic Development say they disagree.

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